Admin Mode: Institution, Expense Category & Merchant

Personal Finance Institution:

1. Click on the **New** link in the 'Finance' area of your Dashboard.

2. On the **Create Institution** page, enter the required information such as Institution Name, Street, State, and Country. Then click on the **Save** button at the bottom of the page to store the information.

3. You will then receive a Success Message.

Personal Finance Expense:

1. Click on the **New** link in the 'Finance' area of your Dashboard.

2. Enter the information in the 'Label' and 'Description' fields on the **Types and Categories** page and click on the **Save** button.

NOTE: To add more rows, click on the **Add More** button.

3. You will then receive a Success Message.

Merchant:

1.   To create a new Merchant, click on the **New** link in the 'Finance' area of Dashbaord.

2.   Enter the data in the fields as required and click on the 'Save' button at the bottom of the page.

3. You will receive a Success Message when the data is saved.

Edit List of Institutions, Expense Categories or Merchants:

You can edit the list of Institutions, Expense Categories or Merchants from the respective lists.

For example: To edit an entry in the list of **Institutions**, follow the steps shown.

1. On the **Personal Finance Institution** list, click on the name of the Institution.

2. Make the necessary changes on the form and click on the **Save** button to update the form.

3. You will then receive a Success Message.
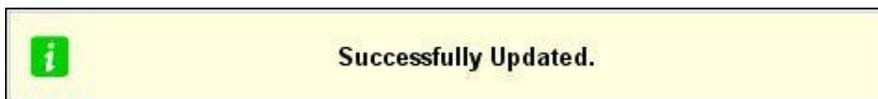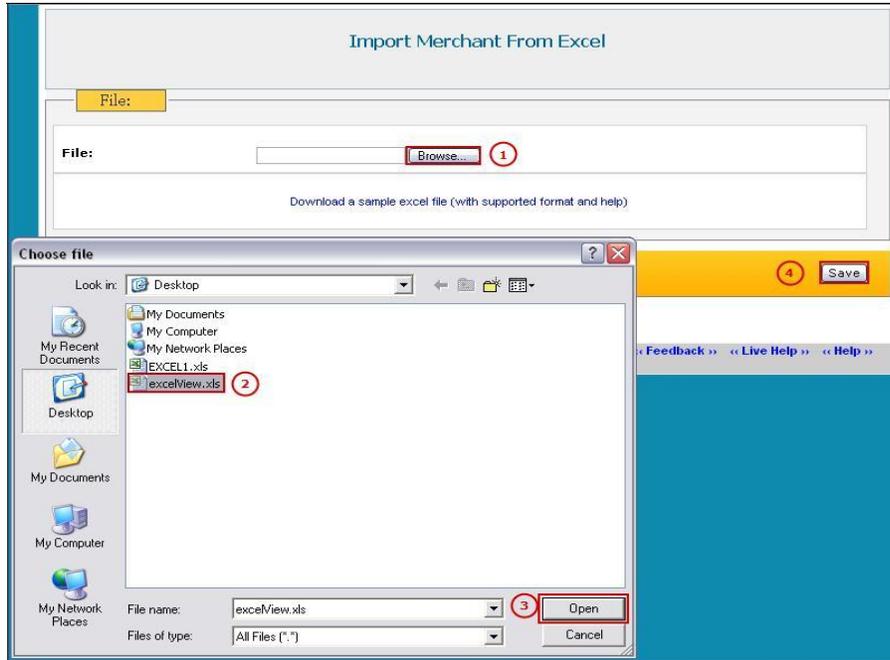

Importing Data from Excel Sheets:

You can import data directly into the forms from Excel Sheets.

For example, to Import Merchant from Excel sheets follow the steps shown below.

1. On your **Dashboard**, click on the **Import from Excel** link in the 'Finance' section.

2. To add the information from the Excel sheet, click on the 'Browse' button on the **Import Merchant From Excel** page. After selecting the file from your computer, click on the 'Open' button to add the file and then click on the 'Save' button.

NOTE: You can download a sample Excel file by clicking on the **Download a sample excel file (with supported format and help)**. The Excel file to be uploaded should be written in the order shown in the sample Excel file.
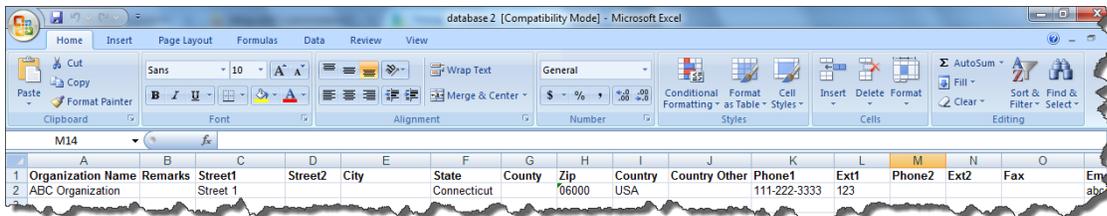
3. The data will then be entered into the form automatically.